

# Merging ARIES Reports in Microsoft Excel

ARIES User Group  
June 2, 2011



# Merging ARIES Reports in Microsoft Excel

*Today's Presentation will cover:*

- ◆ Limitations to Ad Hoc report design in ARIES ReportExport
- ◆ How to merge two ARIES reports using the Excel VLOOKUP() function
- ◆ Online demo of merging a Fix-It report with a Primary Staff Person report
- ◆ Other uses of VLOOKUP() and other ways to merge reports

# ARIES ReportExport Limitations

- ◆ When creating Ad Hoc reports in ReportExport, not all data elements are available for all reports.
- ◆ This means that some reports seem to be missing important data.
- ◆ The ARIES Help Desk often cannot meet certain report requests due to the limitations of ReportExport.
- ◆ The most often requested data element is Primary Staff Person.

# ARIES ReportExport Limitations

- ◆ When creating an Ad Hoc report, you must start by selecting a Primary Table...

**Primary Table**

**New Report**

Please choose a primary table

Client Table
Service Line Item Table
Staff Table
Agency Table

Next

Cancel

# ARIES ReportExport Limitations

- ◆ ...then you may select Additional Tables needed for your report.

**Additional Table** 

**New Report**

**Please check the tables with data you would like to include in the report.**

<input type="checkbox"/> Address Table	<input type="checkbox"/> Contact Info Table	<input type="checkbox"/> Hopwa Worksheet Table	<input type="checkbox"/> Client Related Affected Table
<input type="checkbox"/> Agency Table	<input type="checkbox"/> Custom Data Entry Group Table	<input type="checkbox"/> Housing Assistance Table	<input type="checkbox"/> Risk Factor Table
<input type="checkbox"/> Agency Specifics Table	<input type="checkbox"/> Demographic Table	<input type="checkbox"/> Immunization Table	<input type="checkbox"/> Site Table
<input type="checkbox"/> Acuity Table	<input type="checkbox"/> EIP Functional Table	<input type="checkbox"/> Income History Table	<input type="checkbox"/> Staff Table
<input type="checkbox"/> AIDS Defining Condition Table	<input type="checkbox"/> EIP Behavioral Table	<input type="checkbox"/> Insurance Table	<input type="checkbox"/> SAMISS Assessment Table
<input type="checkbox"/> ART Adherence Table	<input type="checkbox"/> EIP Psychosocial Table	<input type="checkbox"/> Living Situation Log Table	<input type="checkbox"/> Screen Mental Health
<input type="checkbox"/> ART Therapy Table	<input type="checkbox"/> Eligibility Document Table	<input type="checkbox"/> Medical Table	<input type="checkbox"/> Screen Risk Reduction
<input type="checkbox"/> ART Medication Table	<input type="checkbox"/> OBGYN Table	<input type="checkbox"/> Medicare Part D Table	<input type="checkbox"/> Screen Substance Abuse
<input type="checkbox"/> Barriers To Care Table	<input type="checkbox"/> Financial Table	<input type="checkbox"/> Medication Table	<input type="checkbox"/> STI Hepatitis Table
<input type="checkbox"/> Care Hipp Table	<input type="checkbox"/> Funding Source Table	<input type="checkbox"/> Mental Health Treatment Table	<input type="checkbox"/> Substance Abuse Treatment Table
<input type="checkbox"/> Care Plan Table	<input type="checkbox"/> HIV Test Table	<input type="checkbox"/> Needs Assessment Table	<input type="checkbox"/> Tuberculosis Table
<input type="checkbox"/> Case Note Table	<input type="checkbox"/> Hospital Visit Table	<input type="checkbox"/> Other Medication Table	<input type="checkbox"/> Tuberculosis Treatment Table
<input type="checkbox"/> CD4 Table	<input type="checkbox"/> HOPWA Table	<input type="checkbox"/> PAP Smear Table	<input type="checkbox"/> TMP Table
<input type="checkbox"/> Client Table	<input type="checkbox"/> Hopwa Assessment Table	<input type="checkbox"/> Pregnancy Table	<input type="checkbox"/> Viral Load Table
<input type="checkbox"/> CMP Table	<input type="checkbox"/> Hopwa Household Table	<input type="checkbox"/> Program Table	<input type="checkbox"/> Weight Table
<input type="checkbox"/> Contract Table	<input type="checkbox"/> Hopwa Status Table	<input type="checkbox"/> Referral Table	

# ARIES ReportExport Limitations

- ◆ When you select the Client Table as the Primary Table...

## Primary Table

### New Report

Please choose a primary table

Client Table
Service Line Item Table
Staff Table
Agency Table

Next

Cancel



# ARIES ReportExport Limitations

- ◆ When you select the Client Table as the Primary Table...



- ◆ ...adding the Staff Table will give you the name of the client's Primary Staff Person.



# ARIES ReportExport Limitations

- ◆ When you select the Service Line Item Table as the Primary Table...

## Primary Table

### New Report

Please choose a primary table

Client Table
Service Line Item Table
Staff Table
Agency Table



Next

Cancel



# ARIES ReportExport Limitations

- ◆ When you select the Service Line Item Table as the Primary Table...



- ◆ ...adding the Staff Table will give you the name of the Staff Person who provided the Service.

# ARIES ReportExport Limitations

- ◆ Most requests for Ad Hoc reports are based on clients served within a date range.

## Primary Table

### New Report

Please choose a primary table

Client Table
Service Line Item Table
Staff Table
Agency Table



Next

Cancel

- ◆ This requires selecting the Service Line Item Table as the Primary Table, making it impossible to add a client's Primary Staff Person to such a report...  
**UNTIL NOW!**

# Merging ARIES Reports

- ◆ Using Microsoft Excel, data from two different ARIES reports can be merged into a composite report.
- ◆ The reports must both contain a *Unique Client Identifier*. The easiest one to use is the ARIES ID.
- ◆ The *Primary Report* is the most complete of the two reports. It must contain one row per client.
- ◆ The *Secondary Report* is a look-up table. It contains the data you want to add to the Primary Report. It also must contain one row per client.

# Merging ARIES Reports

- ◆ The ARIES “Fix-It” reports are part of OA’s *Data Improvement Project (DIP)*. Each month, we focus on a different data element.
- ◆ The “Fix-It” reports identify clients that do not meet the criteria for that month’s data element so agencies can “fix” the data problems.
- ◆ The “Fix-It” report would be the *Primary Report* for merging.

# Merging ARIES Reports

## The “Fix-It” report for Race/Ethnicity:

**Fix-It: Race and Ethnicity**

ARIES ID	Client	Hispanic Ethnicity	Race 1	Errors	Service Count
10000788	Ama, Mic T	Yes	Unknown/Unreported	Missing Race 1	1
10001689	9000, Hal J	Yes	Other	Missing Race 1	3
10004388	Baker, Ria G	No	Other	Missing Race 1	5
10004467	White, Walter W			Missing Hispanic Ethnicity, Missing Race 1	1
10000843	Brannon, Lizzy L			Missing Hispanic Ethnicity, Missing Race 1	1
10000900	Arbitron, Art A			Missing Hispanic Ethnicity, Missing Race 1	1
10004362	Ramirez, Jennifer M			Missing Hispanic Ethnicity, Missing Race 1	2
10004377	Barrientes, Sarah A			Missing Hispanic Ethnicity, Missing Race 1	1
10004252	Client, Merge B			Missing Hispanic Ethnicity, Missing Race 1	2
10004154	Kilgore, Maddy F			Missing Hispanic Ethnicity, Missing Race 1	1
10000262	Dang, Tom N	Unknown	Pacific Islander	Missing Hispanic Ethnicity,	1
10003731	Abcdr, Jklm	Unknown	Black	Missing Hispanic Ethnicity,	3

# Merging ARIES Reports

- ◆ Correcting data problems on the “Fix-It” reports might be a task for the client’s Primary Staff Person – but the reports do not (and cannot) include that information!
- ◆ The only way to obtain the name of the client’s Primary Staff Person is to run a separate report.
- ◆ The Primary Staff Person report would be the *Secondary Report* for merging.



# Merging ARIES Reports

Ad Hoc report of Primary Staff Person:

ARIES ID and Primary Staff Name	
ARIES ID	Staff Name
10000000	<a href="#">Matalin, Mary</a>
10000001	<a href="#">Reagan, Kes</a>
10000002	<a href="#">Martin, Mary</a>
10000003	<a href="#">Reagan, Kes</a>
10000004	<a href="#">Cooper, Joe</a>
10000005	<a href="#">Matalin, Mary</a>
10000006	<a href="#">Martin, Mary</a>
10000007	<a href="#">Biggs, James</a>
10000008	<a href="#">Cooper, Joe</a>
10000009	<a href="#">Reagan, Kes</a>
10000010	<a href="#">Martin, Mary</a>
10000011	<a href="#">Biggs, James</a>
10000012	<a href="#">Cooper, Joe</a>
10000013	<a href="#">Matalin, Mary</a>
10000014	<a href="#">Cooper, Joe</a>
10000015	<a href="#">Biggs, James</a>
10000016	<a href="#">Martin, Mary</a>
10000017	<a href="#">Matalin, Mary</a>
10000018	<a href="#">Cooper, Joe</a>
10000019	<a href="#">Reagan, Kes</a>
10000020	<a href="#">Martin, Mary</a>
10000021	<a href="#">Biggs, James</a>



# Merging ARIES Reports

Excel can take an ARIES ID from the Primary Report, look it up in the Secondary Report, and retrieve the Staff Name:

**Fix-It: Race and Ethnicity**

ARIES ID	Client	Hispanic Ethnicity	Race 1	Errors
10000788	Ama, Mic T	Yes	Unknown	Missing Race 1
10000003	0000, Hal J	Yes	Other	Missing Race 1
10004388	Baker, Ria G	No	Other	Missing Race 1
10004467	White, Walter W			Missing Hispanic Ethnicity, Missing Race 1
10000843	Brannon, Lizzy L			Missing Hispanic Ethnicity, Missing Race 1

[Reagan, Kes](#)

**ARIES ID and Primary Staff Name**

ARIES ID	Staff Name
10000000	<a href="#">Matellin, Mary</a>
10000001	<a href="#">Reagan, Kes</a>
10000002	<a href="#">Martin, Mary</a>
10000003	<a href="#">Reagan, Kes</a>
10000004	<a href="#">Cooper, Joe</a>

# Merging ARIES Reports

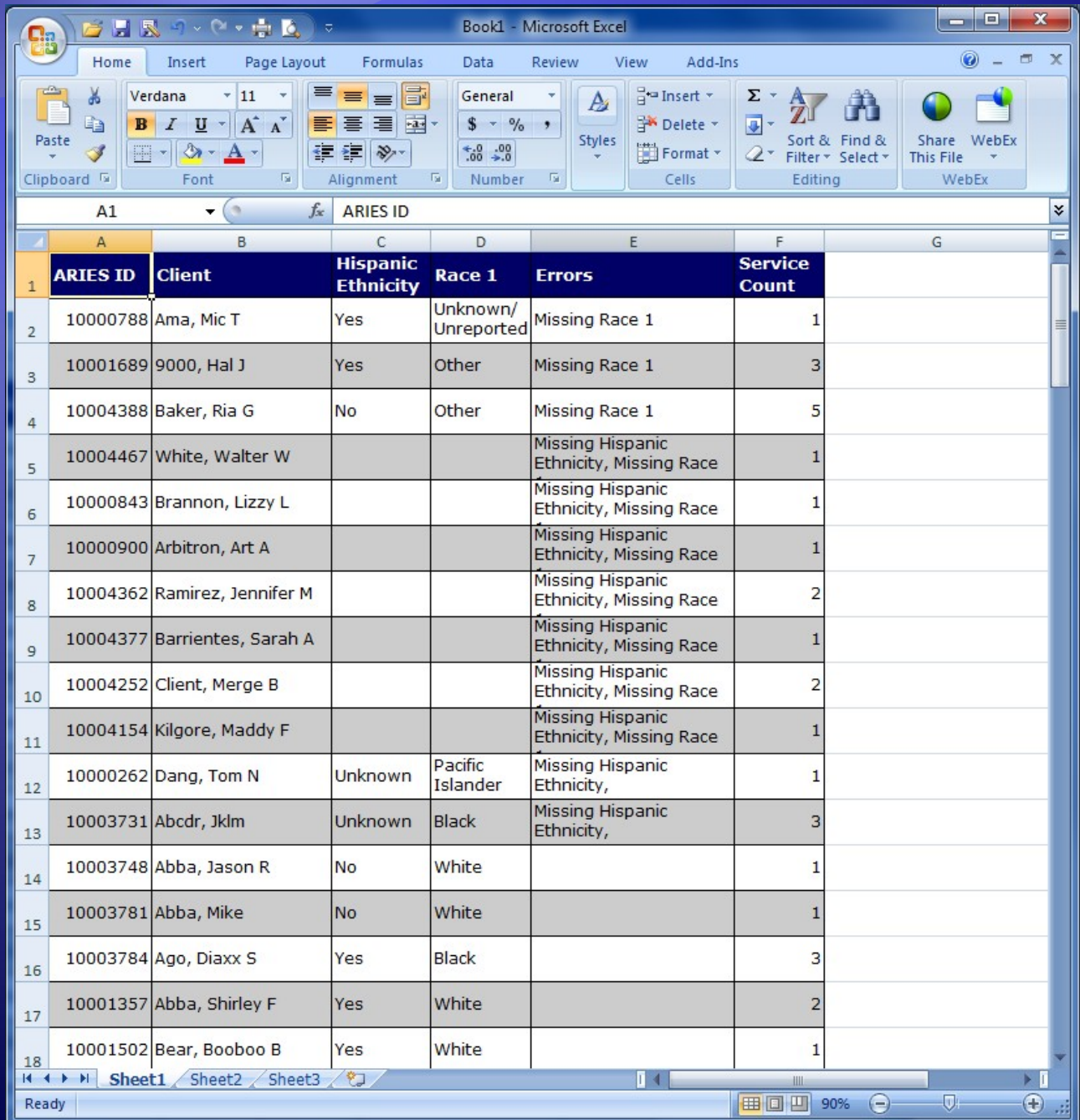
To begin, first run your Primary Report:

## Fix-It: Race and Ethnicity

ARIES ID	Client	Hispanic Ethnicity	Race 1	Errors	Service Count
10000788	Ama, Mic T	Yes	Unknown/Unreported	Missing Race 1	1
10001689	9000, Hal J	Yes	Other	Missing Race 1	3
10004388	Baker, Ria G	No	Other	Missing Race 1	5
10004467	White, Walter W			Missing Hispanic Ethnicity, Missing Race 1	1
10000843	Brannon, Lizzy L			Missing Hispanic Ethnicity, Missing Race 1	1
10000900	Arbitron, Art A			Missing Hispanic Ethnicity, Missing Race 1	1
10004362	Ramirez, Jennifer M			Missing Hispanic Ethnicity, Missing Race 1	2
10004377	Barrientes, Sarah A			Missing Hispanic Ethnicity, Missing Race 1	1
10004252	Client, Merge B			Missing Hispanic Ethnicity, Missing Race 1	2
10004154	Kilgore, Maddy F			Missing Hispanic Ethnicity, Missing Race 1	1
10000262	Dang, Tom N	Unknown	Pacific Islander	Missing Hispanic Ethnicity,	1
10003731	Abcdr, Jklm	Unknown	Black	Missing Hispanic Ethnicity,	3

# Merging ARIES Reports

Copy and Paste into Sheet **1** of Excel:



	A	B	C	D	E	F	G
	ARIES ID	Client	Hispanic Ethnicity	Race 1	Errors	Service Count	
1							
2	10000788	Ama, Mic T	Yes	Unknown/Unreported	Missing Race 1	1	
3	10001689	9000, Hal J	Yes	Other	Missing Race 1	3	
4	10004388	Baker, Ria G	No	Other	Missing Race 1	5	
5	10004467	White, Walter W			Missing Hispanic Ethnicity, Missing Race	1	
6	10000843	Brannon, Lizzy L			Missing Hispanic Ethnicity, Missing Race	1	
7	10000900	Arbitron, Art A			Missing Hispanic Ethnicity, Missing Race	1	
8	10004362	Ramirez, Jennifer M			Missing Hispanic Ethnicity, Missing Race	2	
9	10004377	Barrientes, Sarah A			Missing Hispanic Ethnicity, Missing Race	1	
10	10004252	Client, Merge B			Missing Hispanic Ethnicity, Missing Race	2	
11	10004154	Kilgore, Maddy F			Missing Hispanic Ethnicity, Missing Race	1	
12	10000262	Dang, Tom N	Unknown	Pacific Islander	Missing Hispanic Ethnicity,	1	
13	10003731	Abcdr, Jklm	Unknown	Black	Missing Hispanic Ethnicity,	3	
14	10003748	Abba, Jason R	No	White		1	
15	10003781	Abba, Mike	No	White		1	
16	10003784	Ago, Diaxx S	Yes	Black		3	
17	10001357	Abba, Shirley F	Yes	White		2	
18	10001502	Bear, Booboo B	Yes	White		1	

# Merging ARIES Reports

Next, run your Secondary Report:

**ARIES ID and Primary Staff Name**

ARIES ID	Staff Name
10000000	<a href="#">Matalin, Mary</a>
10000001	<a href="#">Reagan, Kes</a>
10000002	<a href="#">Martin, Mary</a>
10000003	<a href="#">Reagan, Kes</a>
10000004	<a href="#">Cooper, Joe</a>
10000005	<a href="#">Matalin, Mary</a>
10000006	<a href="#">Martin, Mary</a>
10000007	<a href="#">Biggs, James</a>
10000008	<a href="#">Cooper, Joe</a>
10000009	<a href="#">Reagan, Kes</a>
10000010	<a href="#">Martin, Mary</a>
10000011	<a href="#">Biggs, James</a>
10000012	<a href="#">Cooper, Joe</a>
10000013	<a href="#">Matalin, Mary</a>
10000014	<a href="#">Cooper, Joe</a>
10000015	<a href="#">Biggs, James</a>
10000016	<a href="#">Martin, Mary</a>
10000017	<a href="#">Matalin, Mary</a>
10000018	<a href="#">Cooper, Joe</a>
10000019	<a href="#">Reagan, Kes</a>
10000020	<a href="#">Martin, Mary</a>
10000021	<a href="#">Biggs, James</a>



# Merging ARIES Reports

Copy and Paste into Sheet **2** of Excel:

The screenshot shows Microsoft Excel with a table titled 'ARIES ID' in column A and 'Staff Name' in column B. The table contains 31 rows of data. A red callout bubble points to the 'Staff Name' column, stating: 'Not all clients in this sample data have a Primary Staff Person.'

ARIES ID	Staff Name
10000000	Matalin, Mary
10000001	
10000002	
10000003	Reagan, Kes
10000004	
10000005	
10000006	Martin, Mary
10000007	
10000008	
10000009	
10000010	Martin, Mary
10000011	
10000012	Cooper, Joe
10000013	
10000014	Cooper, Joe
10000015	
10000016	
10000017	Matalin, Mary
10000018	
10000019	
10000020	
10000021	Biggs, James
10000022	
10000023	
10000024	
10000025	Reagan, Kes
10000026	
10000027	Biggs, James
10000028	
10000029	

# Merging ARIES Reports

Select columns A & B, name the range:

The screenshot shows a Microsoft Excel window titled 'Book1 - Microsoft Excel'. The ribbon is set to 'Home'. The active sheet is 'Sheet1'. The data table has columns A and B selected. The Name Box shows 'StaffLookup'. A red circle highlights the 'StaffLookup' range name in the Name Box, and a red arrow points to the 'StaffLookup' range name in the Name Box of the Home tab ribbon.

1	ARIES ID	Staff Name
2	10000000	Matalin, Mary
3	10000001	
4	10000002	
5	10000003	Reagan, Kes
6	10000004	
7	10000005	
8	10000006	Martin, Mary
9	10000007	
10	10000008	
11	10000009	
12	10000010	Martin, Mary
13	10000011	
14	10000012	Cooper, Joe
15	10000013	
16	10000014	Cooper, Joe
17	10000015	
18	10000016	
19	10000017	Matalin, Mary
20	10000018	
21	10000019	
22	10000020	
23	10000021	Biggs, James
24	10000022	
25	10000023	
26	10000024	
27	10000025	Reagan, Kes
28	10000026	
29	10000027	Biggs, James
30	10000028	
31	10000029	

# Merging ARIES Reports

On Sheet 1, first blank cell of first data row, click Function (fx) and select VLOOKUP:

The screenshot illustrates the steps to insert a VLOOKUP function in Excel. The main window shows a table with the following data:

ARIES ID	Client	Hispanic Ethnicity	Race 1	Errors	Service Count
10000788	Ama, Mic T	Yes	Unknown/Unreported	Missing Race 1	1
10001689	9000, Hal J	Yes	Other	Missing Race 1	3
10004388	Baker, Ria G	No			
10004467	White, Walter V				
10000843	Brannon, Lizzy				
10000900	Arbitron, Art A				
10004362	Ramirez, Jennifer M				
10004377	Barrientes, Sarah A				
10004252	Client, Merge B				
10004154	Kilgore, Maddy				
10000262	Dane, Tom N	Unknown			

The 'Insert Function' dialog box is open, showing the 'VLOOKUP' function selected. The dialog box includes the following text:

Search for a function:  
Type a brief description of what you want to do and then click Go  
Go  
Or select a category: Lookup & Reference  
Select a function:  
MATCH  
OFFSET  
ROW  
ROWS  
RTD  
TRANSPOSE  
VLOOKUP  
VLOOKUP(lookup\_value,table\_array,col\_index\_num,range\_lookup)  
Looks for a value in the leftmost column of a table, and then returns a value in the same row from a column you specify. By default, the table must be sorted in an ascending order.

The 'Home' ribbon is shown in the inset window, with the 'fx' button circled.



# Merging ARIES Reports

Enter the function parameters below:

The screenshot shows a Microsoft Excel spreadsheet with a VLOOKUP formula entered in cell G2. The formula is `=VLOOKUP(A2,StaffLookup,2,FALSE)`. A red arrow points from the formula bar to the 'Function Arguments' dialog box, which is open. The dialog box shows the following arguments:

- Lookup\_value**: A2 = 10000788
- Table\_array**: StaffLookup = {...}
- Col\_index\_num**: 2 = 2
- Range\_lookup**: FALSE = FALSE

The dialog box also includes a description of the VLOOKUP function and a 'Formula result' of 'Applebaum, Amy'. A red arrow points from the 'Formula result' to the 'Help on this function' link.

The spreadsheet data is as follows:

ARIES ID	Client	Hispanic Ethnicity	Race 1	Errors	Service Count
10000788	Ama, Mic T	Yes	Unknown/Unreported	Missing Race 1	1
10001689	9000, Hal J	Yes	Other	Missing Race 1	3
10004388	Baker, Ria G				
10004467	White, Walter V				
10000843	Brannon, Lizzy				
10000900	Arbitron, Art A				
10004362	Ramirez, Jennif				
10004377	Barrientes, Sar				
10004252	Client, Merge B				
10004154	Kilgore, Maddy				
10000262	Dang, Tom N				
10003731	Abcdr, Jklm				
10003748	Abba, Jason R	No	White		1

# Merging ARIES Reports

Copy the cell containing the VLOOKUP function to the rest of the column:

Book1 - Microsoft Excel

Home Insert Page Layout Formulas Data Review View Add-Ins

Clipboard Font Alignment Number Styles Cells Editing WebEx

G2 =VLOOKUP(A2,StaffLookup,2,FALSE)

	A	B	C	D	E	F	G
	ARIES ID	Client	Hispanic Ethnicity	Race 1	Errors	Service Count	
2	10000788	Ama, Mic T	Yes	Unknown/Unreported	Missing Race 1	1	Applebaum, Amy
3	10001689	9000, Hal J	Yes	Other	Missing Race 1	3	Brown, Deborah
4	10004388	Baker, Ria G	No	Other	Missing Race 1	5	Coates, Linda
5	10004467	White, Walter W			Missing Hispanic Ethnicity, Missing Race	1	Allison, Clay
6	10000843	Brannon, Lizzy L			Missing Hispanic Ethnicity, Missing Race	1	Killoren, Eileen
7	10000900	Arbitron, Art A			Missing Hispanic Ethnicity, Missing Race	1	Nguyen, Quang
8	10004362	Ramirez, Jennifer M			Missing Hispanic Ethnicity, Missing Race	2	Rankin, Thomas
9	10004377	Barrientes, Sarah A			Missing Hispanic Ethnicity, Missing Race	1	Brown, Deborah
10	10004252	Client, Merge B			Missing Hispanic Ethnicity, Missing Race	2	Killoren, Eileen
11	10004154	Kilgore, Maddy F			Missing Hispanic Ethnicity, Missing Race	1	Allison, Clay
12	10000262	Dang, Tom N	Unknown	Pacific Islander	Missing Hispanic Ethnicity,	1	Nguyen, Quang
13	10003731	Abcdr, Jklm	Unknown	Black	Missing Hispanic Ethnicity,	3	0
14	10003748	Abba, Jason R	No	White		1	Butler, Diane
15	10003781	Abba, Mike	No	White		1	Webb, Milton
16	10003784	Ago, Diaxx S	Yes	Black		3	Killoren, Eileen
17	10001357	Abba, Shirley F	Yes	White		2	Allison, Clay
18	10001502	Bear, Booboo B	Yes	White		1	0

Sheet1 Sheet2 Sheet3

Ready 90%

# Merging ARIES Reports

Format as desired, and **VOILA!**

Book1 - Microsoft Excel

Home Insert Page Layout Formulas Data Review View Add-Ins

Clipboard Font Alignment Number Cells Editing WebEx

G2 =VLOOKUP(A2,StaffLookup,2,FALSE)

	A	B	C	D	E	F	G
	ARIES ID	Client	Hispanic Ethnicity	Race 1	Errors	Service Count	Staff Name
2	10000788	Ama, Mic T	Yes	Unknown/Unreported	Missing Race 1	1	Applebaum, Amy
3	10001689	9000, Hal J	Yes	Other	Missing Race 1	3	Brown, Deborah
4	10004388	Baker, Ria G	No	Other	Missing Race 1	5	Coates, Linda
5	10004467	White, Walter W			Missing Hispanic Ethnicity, Missing Race	1	Allison, Clay
6	10000843	Brannon, Lizzy L			Missing Hispanic Ethnicity, Missing Race	1	Killoren, Eileen
7	10000900	Arbitron, Art A			Missing Hispanic Ethnicity, Missing Race	1	Nguyen, Quang
8	10004362	Ramirez, Jennifer M			Missing Hispanic Ethnicity, Missing Race	2	Rankin, Thomas
9	10004377	Barrientes, Sarah A			Missing Hispanic Ethnicity, Missing Race	1	Brown, Deborah
10	10004252	Client, Merge B			Missing Hispanic Ethnicity, Missing Race	2	Killoren, Eileen
11	10004154	Kilgore, Maddy F			Missing Hispanic Ethnicity, Missing Race	1	Allison, Clay
12	10000262	Dang, Tom N	Unknown	Pacific Islander	Missing Hispanic Ethnicity,	1	Nguyen, Quang
13	10003731	Abcdr, Jklm	Unknown	Black	Missing Hispanic Ethnicity,	3	0
14	10003748	Abba, Jason R	No	White		1	Butler, Diane
15	10003781	Abba, Mike	No			1	Webb, Milton
16	10003784	Ago, Diaxx S	Ye			3	Killoren, Eileen
17	10001357	Abba, Shirley F	Ye			1	Allison, Clay
18	10001502	Bear, Booboo B	Yes			1	0

Sheet1 Sheet2 Sheet3

Ready 90%

Clients without a Primary Staff Person will show zero here



# Merging ARIES Reports

You can move the Staff column, sort on Staff, and filter on Errors (non-blank) to list only clients needing follow-up grouped by Primary Staff Person:

Book1 - Microsoft Excel

HomeInsertPage LayoutFormulasDataReviewViewAdd-Ins

ClipboardFontAlignmentNumberStylesCellsEditingWebEx

Verdana11General\$%<=>.00.00.00.00InsertDeleteFormatCellsSort & Find & FilterSelectShare This FileWebEx

A1fxStaff Name

	A	B	C	D	E	F	G	
	Staff Name	ARIES ID	Client	Hispanic Ethnicity	Race 1	Errors	Service Count	
1		0	10003731	Abcdr, Jklm	Unknown	Black	Missing Hispanic Ethnicity,	3
2	Allison, Clay	10004467	White, Walter W			Missing Hispanic Ethnicity, Missing Race	1	
3	Allison, Clay	10004154	Kilgore, Maddy F			Missing Hispanic Ethnicity, Missing Race	1	
4	Applebaum, Amy	10000788	Ama, Mic T	Yes	Unknown/Unreported	Missing Race 1	1	
5	Brown, Deborah	10001689	9000, Hal J	Yes	Other	Missing Race 1	3	
6	Brown, Deborah	10004377	Barrientes, Sarah A			Missing Hispanic Ethnicity, Missing Race	1	
7	Coates, Linda	10004388	Baker, Ria G	No	Other	Missing Race 1	5	
8	Killoren, Eileen	10000843	Brannon, Lizzy L			Missing Hispanic Ethnicity, Missing Race	1	
9	Killoren, Eileen	10004252	Client, Merge B			Missing Hispanic Ethnicity, Missing Race	2	
10	Nguyen, Quang	10000900	Arbitron, Art A			Missing Hispanic Ethnicity, Missing Race	1	
11	Nguyen, Quang	10000262	Dang, Tom N	Unknown	Pacific Islander	Missing Hispanic Ethnicity,	1	
12	Rankin, Thomas	10004362	Ramirez, Jennifer M			Missing Hispanic Ethnicity, Missing Race	2	

Sheet1Sheet2Sheet3

Ready12 of 105 records found90%

# Online Demo

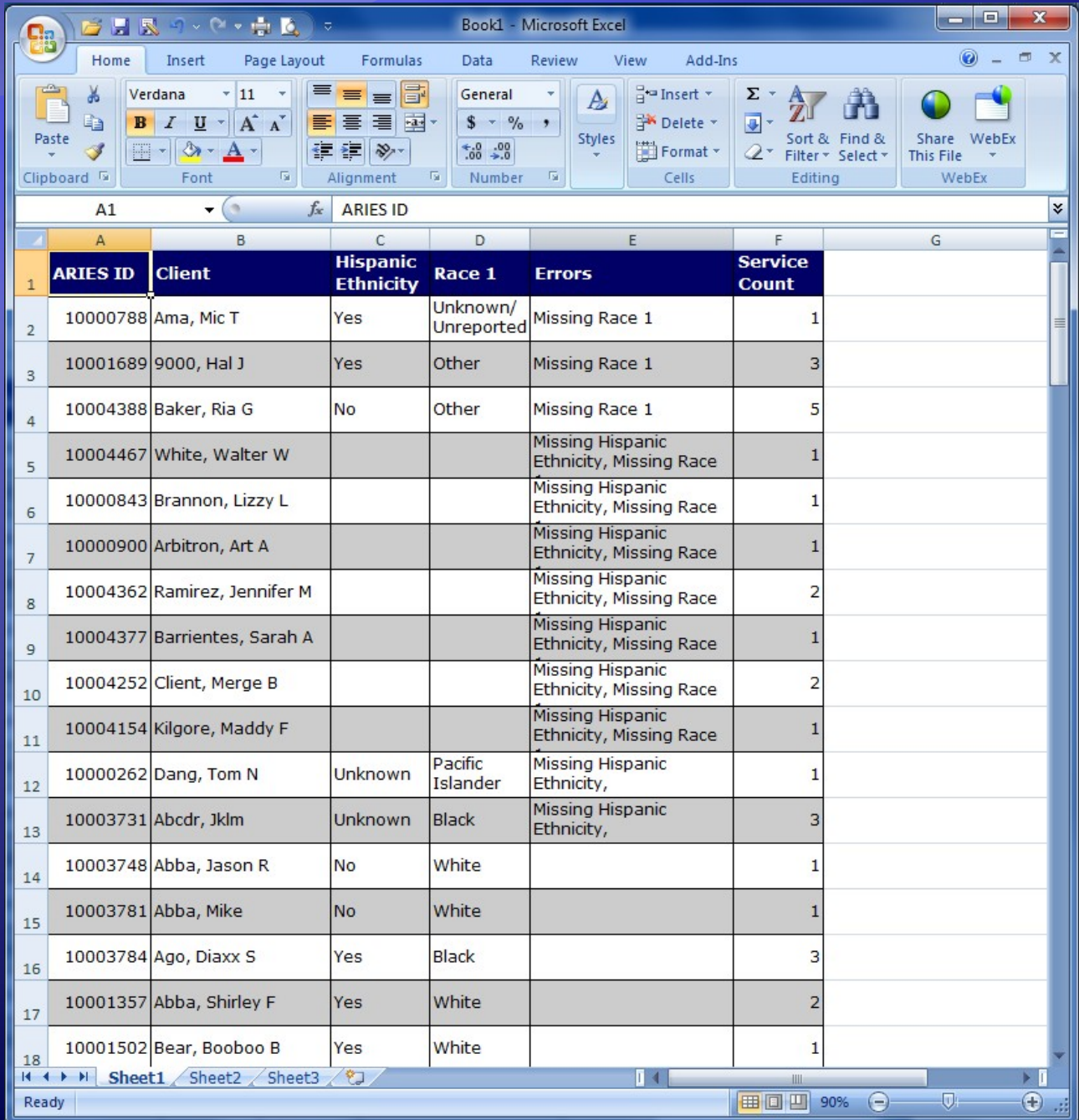
To begin, first run your Primary Report:

## Fix-It: Race and Ethnicity

ARIES ID	Client	Hispanic Ethnicity	Race 1	Errors	Service Count
10000788	Ama, Mic T	Yes	Unknown/Unreported	Missing Race 1	1
10001689	9000, Hal J	Yes	Other	Missing Race 1	3
10004388	Baker, Ria G	No	Other	Missing Race 1	5
10004467	White, Walter W			Missing Hispanic Ethnicity, Missing Race 1	1
10000843	Brannon, Lizzy L			Missing Hispanic Ethnicity, Missing Race 1	1
10000900	Arbitron, Art A			Missing Hispanic Ethnicity, Missing Race 1	1
10004362	Ramirez, Jennifer M			Missing Hispanic Ethnicity, Missing Race 1	2
10004377	Barrientes, Sarah A			Missing Hispanic Ethnicity, Missing Race 1	1
10004252	Client, Merge B			Missing Hispanic Ethnicity, Missing Race 1	2
10004154	Kilgore, Maddy F			Missing Hispanic Ethnicity, Missing Race 1	1
10000262	Dang, Tom N	Unknown	Pacific Islander	Missing Hispanic Ethnicity,	1
10003731	Abcdr, Jklm	Unknown	Black	Missing Hispanic Ethnicity,	3

# Online Demo

Copy and Paste into Sheet **1** of Excel:



Book1 - Microsoft Excel

Home Insert Page Layout Formulas Data Review View Add-Ins

Clipboard Font Alignment Number Styles Cells Editing

A1 ARIES ID

	A	B	C	D	E	F	G
1	ARIES ID	Client	Hispanic Ethnicity	Race 1	Errors	Service Count	
2	10000788	Ama, Mic T	Yes	Unknown/Unreported	Missing Race 1	1	
3	10001689	9000, Hal J	Yes	Other	Missing Race 1	3	
4	10004388	Baker, Ria G	No	Other	Missing Race 1	5	
5	10004467	White, Walter W			Missing Hispanic Ethnicity, Missing Race	1	
6	10000843	Brannon, Lizzy L			Missing Hispanic Ethnicity, Missing Race	1	
7	10000900	Arbitron, Art A			Missing Hispanic Ethnicity, Missing Race	1	
8	10004362	Ramirez, Jennifer M			Missing Hispanic Ethnicity, Missing Race	2	
9	10004377	Barrientes, Sarah A			Missing Hispanic Ethnicity, Missing Race	1	
10	10004252	Client, Merge B			Missing Hispanic Ethnicity, Missing Race	2	
11	10004154	Kilgore, Maddy F			Missing Hispanic Ethnicity, Missing Race	1	
12	10000262	Dang, Tom N	Unknown	Pacific Islander	Missing Hispanic Ethnicity,	1	
13	10003731	Abcdr, Jklm	Unknown	Black	Missing Hispanic Ethnicity,	3	
14	10003748	Abba, Jason R	No	White		1	
15	10003781	Abba, Mike	No	White		1	
16	10003784	Ago, Diaxx S	Yes	Black		3	
17	10001357	Abba, Shirley F	Yes	White		2	
18	10001502	Bear, Booboo B	Yes	White		1	

Sheet1 Sheet2 Sheet3

Ready 90%



# Online Demo

Next, run your Secondary Report:

**ARIES ID and Primary Staff Name**

ARIES ID	Staff Name
10000000	<a href="#">Matalin, Mary</a>
10000001	<a href="#">Reagan, Kes</a>
10000002	<a href="#">Martin, Mary</a>
10000003	<a href="#">Reagan, Kes</a>
10000004	<a href="#">Cooper, Joe</a>
10000005	<a href="#">Matalin, Mary</a>
10000006	<a href="#">Martin, Mary</a>
10000007	<a href="#">Biggs, James</a>
10000008	<a href="#">Cooper, Joe</a>
10000009	<a href="#">Reagan, Kes</a>
10000010	<a href="#">Martin, Mary</a>
10000011	<a href="#">Biggs, James</a>
10000012	<a href="#">Cooper, Joe</a>
10000013	<a href="#">Matalin, Mary</a>
10000014	<a href="#">Cooper, Joe</a>
10000015	<a href="#">Biggs, James</a>
10000016	<a href="#">Martin, Mary</a>
10000017	<a href="#">Matalin, Mary</a>
10000018	<a href="#">Cooper, Joe</a>
10000019	<a href="#">Reagan, Kes</a>
10000020	<a href="#">Martin, Mary</a>
10000021	<a href="#">Biggs, James</a>



# Online Demo

Copy and Paste into Sheet **2** of Excel:

The screenshot shows the Microsoft Excel interface with 'Book1 - Microsoft Excel' open. The 'Home' tab is selected, showing the ribbon with Font, Alignment, Number, Styles, Cells, and Editing groups. The active sheet is 'Sheet2', and the data is pasted into cells A1 through J31. The data table has two columns: 'ARIES ID' and 'Staff Name'. The 'Staff Name' column contains names like 'Matalin, Mary', 'Reagan, Kes', 'Martin, Mary', 'Cooper, Joe', and 'Biggs, James'. A red callout bubble points to the data, stating: 'Not all clients in this sample data have a Primary Staff Person.'

ARIES ID	Staff Name
10000000	Matalin, Mary
10000001	
10000002	
10000003	Reagan, Kes
10000004	
10000005	
10000006	Martin, Mary
10000007	
10000008	
10000009	
10000010	Martin, Mary
10000011	
10000012	Cooper, Joe
10000013	
10000014	Cooper, Joe
10000015	
10000016	
10000017	Matalin, Mary
10000018	
10000019	
10000020	
10000021	Biggs, James
10000022	
10000023	
10000024	
10000025	Reagan, Kes
10000026	
10000027	Biggs, James
10000028	
10000029	

# Online Demo

Select columns A & B, name the range:

The screenshot displays the Microsoft Excel interface with the 'Home' tab selected. The ribbon shows various options including Font, Alignment, Number, Styles, Cells, and Editing. A red circle highlights the 'StaffLookup' named range in the Name Box, which is located at the top left of the worksheet area. A red arrow points from this circle to a zoomed-in view of the ribbon and Name Box. In this zoomed view, the 'StaffLookup' named range is again highlighted with a red circle, and the ribbon options for Font and Alignment are visible. The worksheet data shows columns A and B selected, with column A containing 'ARIES ID' and column B containing 'Staff Name'.

ARIES ID	Staff Name
10000000	Matalin, Mary
10000001	
10000002	
10000003	Reagan, Kes
10000004	
10000005	
10000006	Martin, Mary
10000007	
10000008	
10000009	
10000010	Martin, Mary
10000011	
10000012	Cooper, Joe
10000013	
10000014	Cooper, Joe
10000015	
10000016	
10000017	Matalin, Mary
10000018	
10000019	
10000020	
10000021	Biggs, James
10000022	
10000023	
10000024	
10000025	Reagan, Kes
10000026	
10000027	Biggs, James
10000028	
10000029	

# Online Demo

On Sheet 1, first blank cell of first data row, click Function (fx) and select VLOOKUP:

The screenshot shows the Microsoft Excel interface with the 'Formulas' tab selected. The 'Insert Function' dialog box is open, displaying the 'VLOOKUP' function. The function is described as: 'VLOOKUP(lookup\_value,table\_array,col\_index\_num,range\_lookup) Looks for a value in the leftmost column of a table, and then returns a value in the same row from a column you specify. By default, the table must be sorted in an ascending order.'

The background shows a data table with the following columns: ARIES ID, Client, Hispanic Ethnicity, Race 1, Errors, and Service Count. The first data row (row 2) is highlighted, and the first blank cell of the first data row (cell G2) is circled in red. A red arrow points from the 'fx' button in the formula bar to the 'VLOOKUP' function in the 'Insert Function' dialog box.

ARIES ID	Client	Hispanic Ethnicity	Race 1	Errors	Service Count
10000788	Ama, Mic T	Yes	Unknown/Unreported	Missing Race 1	1
10001689	9000, Hal J	Yes	Other	Missing Race 1	3
10004388	Baker, Ria G	No			
10004467	White, Walter V				
10000843	Brannon, Lizzy				
10000900	Arbitron, Art A				
10004362	Ramirez, Jennifer M				
10004377	Barrientes, Sarah A				
10004252	Client, Merge B				
10004154	Kilgore, Maddy				
10000262	Dane, Tom N	Unknown			



# Online Demo

Enter the function parameters below:

The screenshot shows the Microsoft Excel interface with a spreadsheet titled "Book1". The formula bar displays the formula `=VLOOKUP(A2,StaffLookup,2,FALSE)`. The spreadsheet has columns A through G. Column A is labeled "ARIES ID", B is "Client", C is "Hispanic Ethnicity", D is "Race 1", E is "Errors", and F is "Service Count". The data rows show various clients and their associated information. A "Function Arguments" dialog box is open, showing the parameters for the VLOOKUP function: "Lookup\_value" is A2, "Table\_array" is StaffLookup, "Col\_index\_num" is 2, and "Range\_lookup" is FALSE. The dialog also provides a description of the function and the formula result.

ARIES ID	Client	Hispanic Ethnicity	Race 1	Errors	Service Count
10000788	Ama, Mic T	Yes	Unknown/Unreported	Missing Race 1	1
10001689	9000, Hal J	Yes	Other	Missing Race 1	3
10004388	Baker, Ria G				
10004467	White, Walter V				
10000843	Brannon, Lizzy				
10000900	Arbitron, Art A				
10004362	Ramirez, Jennif				
10004377	Barrientes, Sar				
10004252	Client, Merge B				
10004154	Kilgore, Maddy				
10000262	Dang, Tom N				
10003731	Abcdr, Jklm				
10003748	Abba, Jason R	No	White		1

Function Arguments

VLOOKUP

Lookup\_value: A2 = 10000788

Table\_array: StaffLookup = {...}

Col\_index\_num: 2 = 2

Range\_lookup: FALSE = FALSE

Formula result = Applebaum, Amy

Help on this function

OK Cancel

Lookup\_value A2 = 10000788

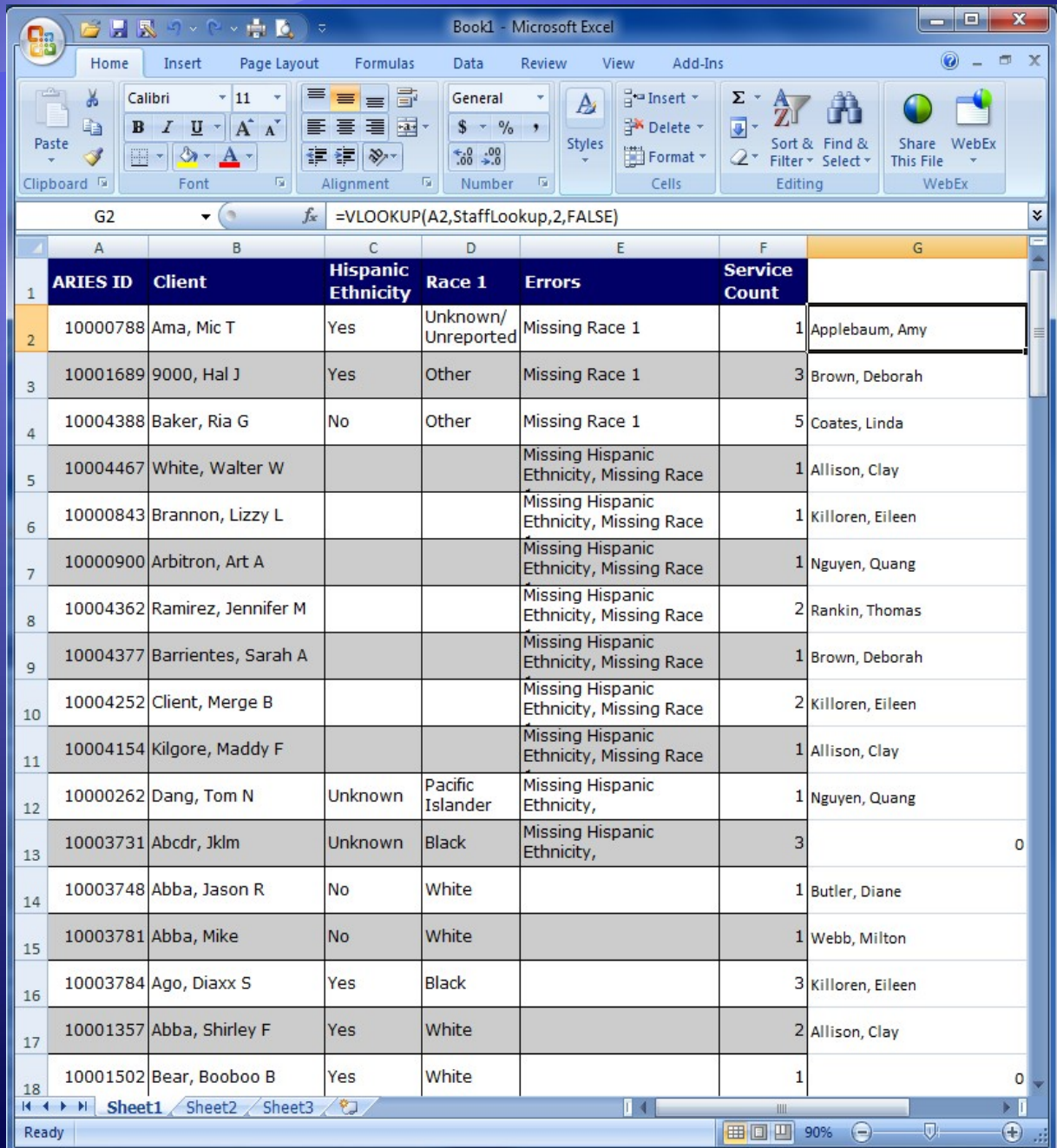
Table\_array StaffLookup = {...}

Col\_index\_num 2 = 2

Range\_lookup FALSE = FALSE

# Online Demo

Copy the cell containing the VLOOKUP function to the rest of the column:



The screenshot shows the Microsoft Excel interface with the formula bar displaying `=VLOOKUP(A2,StaffLookup,2,FALSE)`. The spreadsheet contains a table with the following data:

	A	B	C	D	E	F	G
	ARIES ID	Client	Hispanic Ethnicity	Race 1	Errors	Service Count	
1							
2	10000788	Ama, Mic T	Yes	Unknown/Unreported	Missing Race 1	1	Applebaum, Amy
3	10001689	9000, Hal J	Yes	Other	Missing Race 1	3	Brown, Deborah
4	10004388	Baker, Ria G	No	Other	Missing Race 1	5	Coates, Linda
5	10004467	White, Walter W			Missing Hispanic Ethnicity, Missing Race	1	Allison, Clay
6	10000843	Brannon, Lizzy L			Missing Hispanic Ethnicity, Missing Race	1	Killoren, Eileen
7	10000900	Arbitron, Art A			Missing Hispanic Ethnicity, Missing Race	1	Nguyen, Quang
8	10004362	Ramirez, Jennifer M			Missing Hispanic Ethnicity, Missing Race	2	Rankin, Thomas
9	10004377	Barrientes, Sarah A			Missing Hispanic Ethnicity, Missing Race	1	Brown, Deborah
10	10004252	Client, Merge B			Missing Hispanic Ethnicity, Missing Race	2	Killoren, Eileen
11	10004154	Kilgore, Maddy F			Missing Hispanic Ethnicity, Missing Race	1	Allison, Clay
12	10000262	Dang, Tom N	Unknown	Pacific Islander	Missing Hispanic Ethnicity,	1	Nguyen, Quang
13	10003731	Abcdr, Jklm	Unknown	Black	Missing Hispanic Ethnicity,	3	0
14	10003748	Abba, Jason R	No	White		1	Butler, Diane
15	10003781	Abba, Mike	No	White		1	Webb, Milton
16	10003784	Ago, Diaxx S	Yes	Black		3	Killoren, Eileen
17	10001357	Abba, Shirley F	Yes	White		2	Allison, Clay
18	10001502	Bear, Booboo B	Yes	White		1	0

# Online Demo

Format as desired, and **VOILA!**

Book1 - Microsoft Excel

Home Insert Page Layout Formulas Data Review View Add-Ins

Clipboard Font Alignment Number Styles Cells Editing WebEx

G2 =VLOOKUP(A2,StaffLookup,2,FALSE)

	A	B	C	D	E	F	G
	ARIES ID	Client	Hispanic Ethnicity	Race 1	Errors	Service Count	Staff Name
2	10000788	Ama, Mic T	Yes	Unknown/Unreported	Missing Race 1	1	Applebaum, Amy
3	10001689	9000, Hal J	Yes	Other	Missing Race 1	3	Brown, Deborah
4	10004388	Baker, Ria G	No	Other	Missing Race 1	5	Coates, Linda
5	10004467	White, Walter W			Missing Hispanic Ethnicity, Missing Race	1	Allison, Clay
6	10000843	Brannon, Lizzy L			Missing Hispanic Ethnicity, Missing Race	1	Killoren, Eileen
7	10000900	Arbitron, Art A			Missing Hispanic Ethnicity, Missing Race	1	Nguyen, Quang
8	10004362	Ramirez, Jennifer M			Missing Hispanic Ethnicity, Missing Race	2	Rankin, Thomas
9	10004377	Barrientes, Sarah A			Missing Hispanic Ethnicity, Missing Race	1	Brown, Deborah
10	10004252	Client, Merge B			Missing Hispanic Ethnicity, Missing Race	2	Killoren, Eileen
11	10004154	Kilgore, Maddy F			Missing Hispanic Ethnicity, Missing Race	1	Allison, Clay
12	10000262	Dang, Tom N	Unknown	Pacific Islander	Missing Hispanic Ethnicity,	1	Nguyen, Quang
13	10003731	Abcdr, Jklm	Unknown	Black	Missing Hispanic Ethnicity,	3	0
14	10003748	Abba, Jason R	No	White		1	Butler, Diane
15	10003781	Abba, Mike	No			1	Webb, Milton
16	10003784	Ago, Diaxx S	Ye			3	Killoren, Eileen
17	10001357	Abba, Shirley F	Ye			1	Allison, Clay
18	10001502	Bear, Booboo B	Yes			1	0

Sheet1 Sheet2 Sheet3

Ready 90%

Clients without a Primary Staff Person will show zero here



# Online Demo

You can move the Staff column, sort on Staff, and filter on Errors (non-blank) to list only clients needing follow-up grouped by Primary Staff Person:

Book1 - Microsoft Excel

HomeInsertPage LayoutFormulasDataReviewViewAdd-Ins

Paste

Clipboard

Font

Alignment

General

Number

Styles

Insert

Delete

Format

Cells

Σ

Sort & Filter

Find & Select

Editing

Share This File

WebEx

A1

Staff Name

	A	B	C	D	E	F	G
1	Staff Name	ARIES ID	Client	Hispanic Ethnicity	Race 1	Errors	Service Count
2	0	10003731	Abcdr, Jklm	Unknown	Black	Missing Hispanic Ethnicity,	3
3	Allison, Clay	10004467	White, Walter W			Missing Hispanic Ethnicity, Missing Race	1
4	Allison, Clay	10004154	Kilgore, Maddy F			Missing Hispanic Ethnicity, Missing Race	1
5	Applebaum, Amy	10000788	Ama, Mic T	Yes	Unknown/Unreported	Missing Race 1	1
6	Brown, Deborah	10001689	9000, Hal J	Yes	Other	Missing Race 1	3
7	Brown, Deborah	10004377	Barrientes, Sarah A			Missing Hispanic Ethnicity, Missing Race	1
8	Coates, Linda	10004388	Baker, Ria G	No	Other	Missing Race 1	5
9	Killoren, Eileen	10000843	Brannon, Lizzy L			Missing Hispanic Ethnicity, Missing Race	1
10	Killoren, Eileen	10004252	Client, Merge B			Missing Hispanic Ethnicity, Missing Race	2
11	Nguyen, Quang	10000900	Arbitron, Art A			Missing Hispanic Ethnicity, Missing Race	1
12	Nguyen, Quang	10000262	Dang, Tom N	Unknown	Pacific Islander	Missing Hispanic Ethnicity,	1
13	Rankin, Thomas	10004362	Ramirez, Jennifer M			Missing Hispanic Ethnicity, Missing Race	2

Sheet1Sheet2Sheet3

Ready 12 of 105 records found

90%



# Final Thoughts

- ◆ The Excel VLOOKUP() function can be used for other purposes:
  - Staff Person who entered a Service
  - Agency holding an Eligibility Doc
  - Staff Person who did an Assessment
- ◆ Microsoft Access can also merge data from two reports:
  - Export each report as XML file
  - Import first file, rename temp table
  - Import second file, rename temp table
  - Create query, joining on ARIES ID

# Final Thoughts

- ◆ The ARIES Help Desk can assist with report design of Primary and Secondary reports for merging.
- ◆ The ARIES Help Desk cannot provide detailed assistance with Microsoft Excel.

**ARIES Help Desk**  
**866-411-ARIES (2743)**

